

# Food Security & Nutrition

Issued October 25, 2011

Quarterly Brief - Focus on *Deyr* Season Early Warning

## KEY ISSUES

FSNAU continues to monitor the famine situation in Somalia, which is defined on the basis of three outcomes of Integrated Phase Classification (IPC), including food access, malnutrition levels and mortality. Currently, nutrition surveys are being conducted in southern Somalia, which will confirm any changes in famine phase classification. The results of these assessments are expected mid November. However, the current dynamics in prices of cereals and livestock, purchasing power, livestock trade, humanitarian interventions and the start of *Deyr* seasonal activities point at a slight improvement in the food security situation. Despite this, the situation of the majority of rural, urban and IDP populations is still very fragile, particularly in famine-stricken areas, as the scale of humanitarian interventions still does not fully meet the existing needs. Until the updated nutrition and mortality indicators become available the food security situation in Somalia remains as classified during the post *Gu* 2010/11 assessment (Jul – Dec 2011) with an estimated 4 million people in crisis.

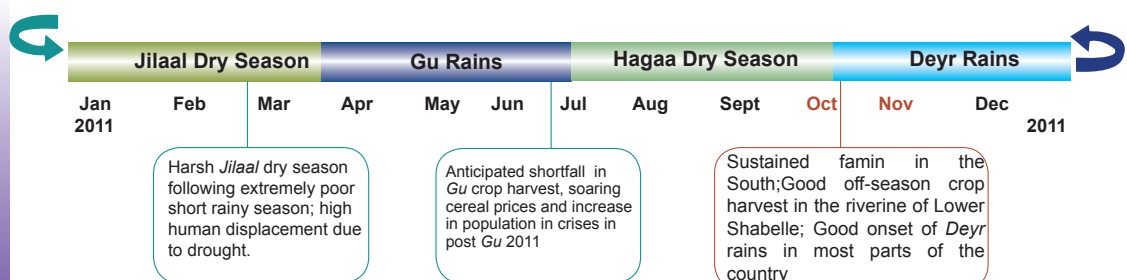
The intense humanitarian interventions in parts of the South have already shown a positive effect on food accessibility of the population. The cereal prices have reduced drastically in most parts of the southern regions and the purchasing power has strengthened. However, the prices of cereals are still significantly elevated, hence the purchasing power is weak compared to a year ago. The off-season harvest collected in Shabelle and Juba regions have contributed to improved local cereal availability in these regions. Yet, the production is only sufficient for slightly over 4 months for the riverine population of these regions, mostly in Lower Shabelle. However, the cereal stocks are depleted among the large majority of the farmers who currently depend on food purchases at high prices. Given low local cereal availability as a result of two last seasons of harvest failure, the prices are likely to increase in the coming two months unless increased supply of relief food mitigates the existing cereal deficit.

The start of short rainy season prompted *Deyr* planting activities in southern Somalia. However, the activities are not at scale given large population out-migration in the recent months in search of humanitarian food in refugee camps either within the country or across its borders (Kenya, Ethiopia). The performance of *Deyr* rains in the next two-three weeks will be an important determining factor for additional cultivation in potential agricultural areas. However, the forecasted slow down in rains in the second half of the rainy season in Gedo and Juba regions, will impact the crop performance and yields in these areas. Therefore, the overall *Deyr* production in southern Somalia is likely to be below average.

The *Deyr* rains have slightly improved pasture and water across the country. Therefore, livestock conditions have also shown some improvement, although not fully recovered from the prevailing drought in the past one year. Therefore, the livestock production and reproduction is far below average in most pastoral and agropastoral areas, particularly where cattle and sheep are the dominant livestock species. The areas of concern are South-East Pastoral of Lower Shabelle, Juba and Bay regions (cattle pastoralists), as well as Bakool, East Golis and Coastal *Deeh* of North and Central (sheep, goat and camel pastoralists). The poor pastoralists in these areas experienced high livestock losses during the prolonged drought, while they are also heavily indebted (food and water). Hence, considerable livestock asset stripping continues to meet the basic needs and pay-off the debts. Similarly, poor and most of the middle wealth pastoralists from Nugal Valley, Coastal *Deeh* and Sool Plateau livelihood zones in North and Central are also affected with high livestock off-take and lack of saleable animals. Therefore, these pastoralists will not benefit much from increased livestock prices and export demand during the religious festive period of *Hajj*.

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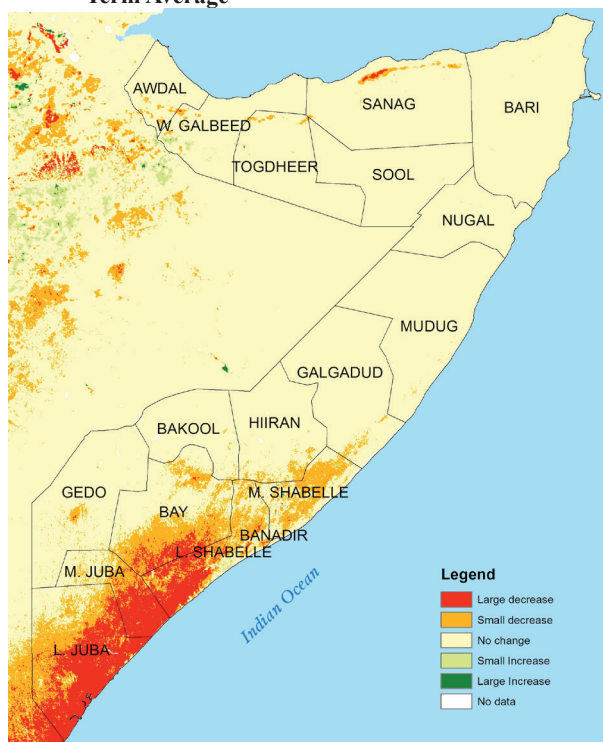


Somalia Seasonal Timeline & Key Events

## SECTOR HIGHLIGHTS

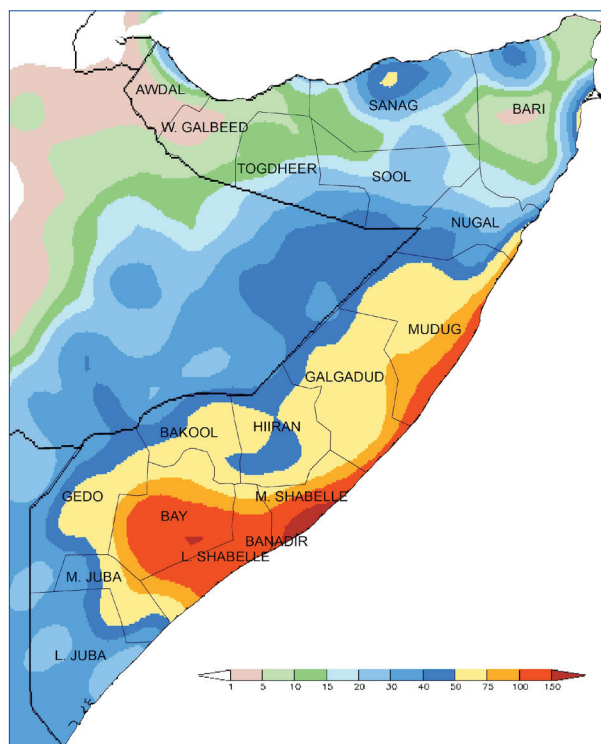
### CLIMATE

**Map 1: September NDVI Absolute Difference from Long Term Average**



Source: National Oceanic and Atmospheric Administration (NOAA)

**Map 2: RFE Forecast 22- 28 October 2011**



Source: National Oceanic and Atmospheric Administration (NOAA)

General dry conditions prevailed in most parts of Somalia during the July-September period. However, the Northwest (Awdal, W.Galbeed, Togdheer and Sanaag) received good *Karan* rains, while in September unusual showers were observed in the Northeast (Bari) and parts of Hawd and Nugal Valley of Nugaal region. In addition, Coastal *Deeh* and adjacent agropastoral and riverine livelihoods of Lower Shabelle region, and small pockets of Kismayo, Jamame and Jilib districts in the Juba regions received good *Hagaa* rains between July and September. The *Hagaa* dry conditions ceased with the onset of early *Deyr* rains, with light to moderate showers observed in the first and second *dekad* of October in most parts of the country. These rains significantly improved the rangelands conditions, replenished most of the *berkads*, water catchments, communal dams and increased the water levels in the shallow wells and rivers. However, in the second *dekad* of October, Galgaduud, Hirraan, Nugaal, Bari as well as parts of Sanaag and north Mudug remained completely dry.

The July-September SPOT Normalised Difference Vegetation Index (NDVI) images indicate close to the Long Term Mean (LTM) vegetation conditions in most of northern and central Somalia (Map 1). However, most of the southern agricultural areas of Juba, Shabelle and Bay regions show below average vegetation conditions due to the start of planting season. However, normal vegetation is depicted in southern pastoral areas.

According to the National Oceanic and Atmospheric Administration (NOAA) 22-28 October rainfall forecast, most of South, Central and pockets of East Golis of Erigabo, Coastal *Deeh* of Nugal and Bari will likely receive 75-150mm of rainfall. However, in most parts of the North, there is an increased likelihood of near normal to below normal rainfall (5-15mm) with the exception of Awdal region where near normal to above normal rainfall (20-50mm) is expected (Map 2). According to the European Centre for Medium-Range Weather Forecast (ECMWF), *Deyr* rains are likely to be near-normal to above normal, except for Awdal and W. Galbeed regions that are forecasted to remain dry (a normal seasonal trend). However, cumulative rainfall in November and December will decline by up to 50mm in Juba and Gedo regions.

## CIVIL INSECURITY

Sporadic clashes between the Transitional Federal Government (TFG) and/or its allies with support from the African Union Mission in Somalia (AMISOM) and opposing armed factions continued throughout September and October 2011 in parts of the southern and central regions<sup>1</sup>. Presently there is also heightened warfare and extensive Kenyan military presence in the Juba regions and the Kenyan border areas of Gedo region. Additionally, resource based conflicts were reported in September 2011 in the rural areas of Central (Xeraale, Gelinsoor, Dhegtuur, Mirjicley) and the Bari region (Rako, Kobdhexaad and Qodax villages) between Bosasso and Iskushuban districts.

The above conflicts have resulted in human casualties, displacements as well as disruption of economic activities and livelihoods of people from the affected areas. According to the United Nations High Commissioner for Refugees (UNHCR) Population Movement Tracking (PMT) update (14 Oct '11), about 42,000 people were internally displaced since September 2011. Due to the civil unrest, majority of the displaced persons (60%) are from the South, mostly from Mogadishu, Bay, Gedo and parts of Juba regions. The prevailing insecurity has further impacted trade and economic activities (commodity movement), particularly in the border areas of Juba, Gedo and Galgaduud regions as well as in the rural areas of Bari region (Bossaso and Iskushuban).

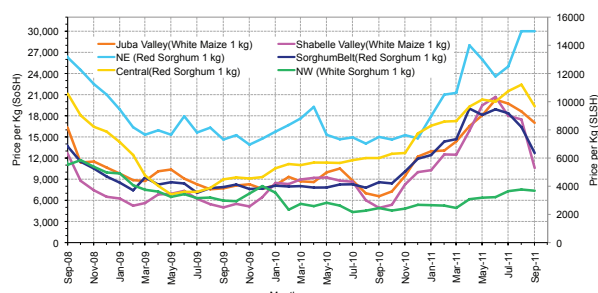
In spite of improved humanitarian response, the affected population in the South-Central still find it difficult to access humanitarian assistance due to insecurity. Targeting and looting of humanitarian food consignments were reported in Dhusamareb districts (Galgaduud). In Bay region, banning of the local Non-Governmental Organizations (NGOs) activities was also reported. The security situation is more likely to worsen in the South and Central in the coming two months given the current mobilization of forces amongst the warring parties.

## AGRICULTURE

In October 2011, FSNAU undertook a rapid assessment to estimate the off-season crop harvest in Lower Shabelle and Juba regions and assess the *Deyr* planting activities in the South. According to the assessment results, a total of 33,300ha of off-season maize, sesame and cowpea were harvested in the riverine areas of Lower Shabelle and Juba regions as well as parts of Lower Shabelle agropastoral (maize). The actual off-season maize production estimates are 12,000MT, of which 80 percent was collected in the riverine areas of Lower Shabelle (8,325MT) and the Jubas (1,350MT), while the rest came from the agropastoral of Lower Shabelle (2,310MT). In Lower Shabelle the current off-season maize production is 46 percent of the total *Gu* 2011 cereal production and 17 percent of the *Gu* cereal Post War Average (PWA). In the Jubas, the off-season maize (1,350MT), which was mostly collected from Middle Juba (1,250MT), is 152 percent of the total *Gu* 2011 cereal production but only 9 percent of the *Gu* PWA. The off-season harvest in the riverine areas is almost triple the amount projected in the Post-*Gu* assessment findings (4,150MT), which is a result of moderate *Hagaa* rains and intensive irrigation activities, which benefitted all farmers in Lower Shabelle (gravity irrigation). However, pump irrigation in the Jubas was only accessed by the better-off and upper middle households due to the costs associated with its operation. In the agropastoral areas of Lower Shabelle, the actual off-season harvest is lower (3,700MT) than the earlier projected, which is attributable to severe moisture stress brought on by the early cessation of *Hagaa* rains. In addition to maize, 925MT of off-season sesame was collected in Lower Shabelle (760MT) and Middle Juba (165MT). Middle Juba also harvested 135MT of cowpea although this crop completely failed in Lower Juba due to early cessation of *Hagaa* rains.

The moderate late September and October 2011 rains in the riverine and agropastoral areas of the Shabelles, Bay, Bakool, Northwest agropastoral and localized areas of Juba and Hiran were beneficial for early *Deyr* dry sowing and for the already established maize and rice in the riverine areas. However, land preparation and planting are below average for this time of the year due to the massive displacement of people to the refugee camps as well as to access humanitarian relief in Mogadishu, Mareerey in Juba, other towns of southern Somalia and the refugee camps in Kenya and Ethiopia. In the agropastoral areas of the Northwest, the standing crops have significantly improved due to good *Karan* rains in late July to September 2011. Therefore, the prospects of *Gu-Karan* harvest are better than projections made in *Gu* 2011. The estimates of the *Gu-Karan* harvest will be available in mid-November after the completion of the on-going FSNAU crop assessment in the Northwest.

Figure 1: Monthly Trends in Local Cereal Prices



<sup>1</sup> The fightings occurred in Mogadishu, Lower Juba (border areas of Dhobley, Taabta), Gedo (Garoboharey, Elwaq), Hiran (North of Beledweyne district), Galgaduud (Dhusamareb) and Mudug (Galkayo).

Farming activities both the off-season (harvesting, transporting and threshing) as well as the on-going *Deyr* 2011 season (land preparation, planting and first weeding) have created job opportunities for poor households since late September. Therefore, the daily labour wage rates were higher in September compared to July 2011 in the rural markets of Shabelle (13%), Juba (26%) and Sorghum Belt (8%). Cereal prices in southern Somalia have shown a decreasing trend between June and September 2011 in most reference markets (16% to 35% for maize and 24% to 41% for red sorghum) as a result of increased availability from local harvest as well as humanitarian food distributions by relief agencies (Figure 1). In central and northern regions, cereal prices remained stable. However, local cereal prices are considerably higher compared to September 2010, particularly in southern regions (e.g. Juba -158% increase in maize price; Bay -179% increase in sorghum).

## LIVESTOCK SECTOR

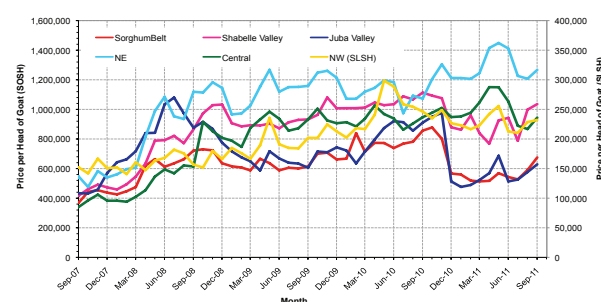
Pasture and water conditions have further deteriorated during the *Hagaa* dry season (July-September) in most key pastoral livelihoods of the country. However, following the good rainfall in August-September the rangeland conditions improved in Shabelle (*Hagaa*), W. Galbeed, Togdheer and Awdal (*Karan*) regions. Furthermore, localized unusual moderate rains in Central (Galgadud, Mudug) and Hiran regions and early *Deyr* rains in parts of Sanaag, Sool, and Bari that occurred in September 2011, have improved rangeland conditions and prompted return of out-migrated livestock to these areas. Forecasted near-normal to normal *Deyr* rains which already started in most parts of Somalia are expected to mitigate water shortages and curb the elevated water prices across the country. The body condition of milking and expectant animals has significantly deteriorated in most areas of South-Central, apart from the northern and Shabelle regions owing to good *Karan* rains and *Hagaa* showers, respectively. Livestock conception in the North and Shabelle regions also improved in the last two months. In most key pastoral areas of North, kidding and lambing started in September, albeit at a slower rate.

The livestock export volumes and prices indicate an increasing trend due to *Ramadan* and *Hajj* stocking activities. The cumulative livestock exports in July-September 2011 increased by 17-18 percent from the ports of Berbera (754,315 heads) and Bossaso (422,278) compared to the same period of 2010. However, in September 2011 livestock exports declined about 45 percent from both ports compared to July 2011. The exports were also lower than in the last month both from Berbera (25%) and Bossaso (11%) posts, which is a result of a reduced availability of export quality males within Somalia (drought effect) as well as regulations on livestock export tax implemented by the Ethiopian authorities, which reduced the supply of livestock from Ethiopia to the Somali ports. In Juba, Shabelle and the Sorghum Belt, local quality goat prices increased in the range of 20-30 percent between July-September, but are still lower than a year ago in all regions (Shabelle - 7%; Juba - 31% and Sorghum Belt - 21%). In the northern and central regions, goat local quality price increased slightly (3-10%) between July-September and are comparable with the levels the same time last year. However, in the Northeast moderate annual increases are observed for a local goat (18%) as well as the camel (11%) due to lack of supply in the main market catchment areas (Nugal Valley, Sool Plateau and Hawd) given high off-take during *Jilaal* season (Figure 2). No major livestock disease outbreaks or deaths were reported in the *Hagaa* period from all livelihoods.



Off-season maize. Busley village, Kurtunwaarey. FSNAU, September 2011

Figure 2: Regional Trends in Local Quality Goat Prices (SOSH/SLSH)



Average pasture and body condition-Hawd. FSNAU, September 2011

## MARKETS AND TRADE

Although volumes of cereal imports (179,233 MT) through Bossaso, Berbera and Mogadishu ports have declined between June and September 2011, in line with seasonal pattern, they were still 48 percent higher when compared to the same period last year. Over the same period, a total of 15,207 MT of maize, sorghum and wheat grain were imported from Kenya and Ethiopia through cross-border trade. At the same time, an outflow of 10,123 Mt of cereals (rice, pasta, and wheat flour) from Somalia to these countries was also recorded.

Over the last three months (June-September), the Somali Shilling (SoSh) gained modestly (2-9%) against the US dollar in most main markets of Somalia with the highest appreciation of 9 percent being recorded in Baidoa and Kismayo markets. In the same period, the SiSh value also appreciated modestly (3-5%) in the markets of SiSh zone. Increased export earnings from intense livestock trade during the religious festivities (Ramadan and *Hajj*), coupled with the increased dollar inflow from the humanitarian community are the likely reasons for these trends. Compared to the same period last year the SoSh gained marginally (2-3% gain), while the SiSh exhibited a considerable appreciation (5-11%).

In the southern markets, prices of some of the essential imported commodities (diesel, vegetable oil and wheat flour) mostly remained stable or decreased over the last three months. However, sugar prices have recorded moderate increases (8-12%) in southern regions in line with the trends on international markets. Rice prices have remained relatively stable in most southern regions apart from Banadir, Shabelle (12% increase in each) and Gedo (11% decline). The prices of the monitored imported commodities exhibited increasing trends in central and northern markets, with the highest price increases recorded for vegetable oil in Northeast (20%) and sugar in the Northwest (16%). The prices of all imported commodities in southern regions are higher than the same time last year, particularly for sugar (up to 45% increase in Juba). In the central and northern markets the highest annual increases were recorded for vegetable oil (61%) in the Northeast and diesel (29%) in Central. International market price dynamics combined with the gaining streak of the Shillings and increased humanitarian interventions, are likely underlying factors shaping price patterns in the reporting period. In the last three months, the Consumer Price Index (CPI) in southern regions decreased by 16 percent, reflecting the price dynamics of major commodities in the minimum basket (e.g. local sorghum). In the same period, the CPI increased by 5-13 percent in the northern regions, while remaining stable in the central regions (Figure 3).

## NUTRITION SITUATION

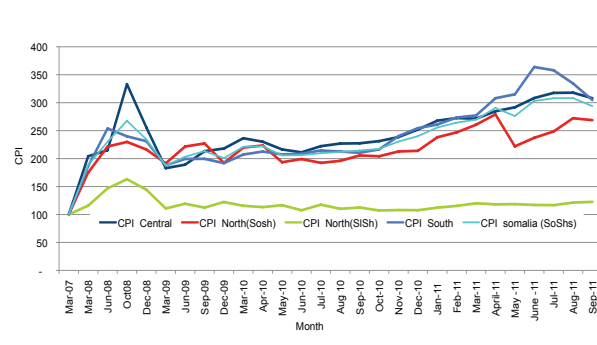
The nutrition situation in southern Somalia remains grim based on findings from the July-August nutrition surveys as reported in the Nutrition (28 Sep, 2011) and Food security Technical Series reports (Oct, 8, 2011). A repeat of the surveys is currently ongoing in all southern regions, including IDPs in Afgoye, Mogadishu and Kismayo. The findings of the surveys are expected to be shared in mid November.

According to the WHO health update (Somalia Emergency Health Update, 14 October, World Health Organisation), more than 900 suspected measles cases have been reported among the internally displaced populations in Bay region and 60 percent are children under 5 years. An Emergency Vaccination Campaign was completed in accessible regions of South Central Somalia (measles, polio, vitamin A and deworming), with more than one million children reached with these vaccinations. A second emergency vaccination campaign is planned in Mogadishu from October 25th to November 3rd, targeting 750 000 children in 16 districts.

In Mogadishu, Banadir Hospital reported 220 cases of Acute Watery Diarrhoea (AWD) including 164 (65%) children under five years, with 6 related deaths (3 among children <5). This represents a continuous high number of AWD cases being reported as compared to the past weeks. However, the increased influx of internally displaced people, and the precarious living conditions, contributes to a higher risk for new outbreaks. WHO and partners continue to monitor the trends and support AWD preventive activities; case management supplies have been pre-positioned in Mogadishu, ready for dispatch.

Nutrition surveys will be carried in IDP settlements in the Northwest (Hargeisa, Burao and Berbera) and the Northeast (Bossaso, Garowe, Qardho, Galkayo, Margaga) from October 25<sup>th</sup>, 2011 and November 1<sup>st</sup>, 2011, respectively.

Figure 3: Monthly Trends in Consumer Price Index (CPI)



# INTEGRATED FOOD SECURITY ANALYSIS

## URBAN

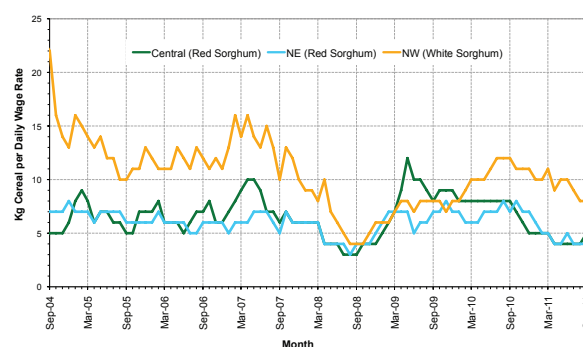
A large portion of the urban population continues to struggle to meet their food and non-food needs given high food prices and overall cost of living in most parts of the country. Although a decline in the locally produced cereals was recorded in most regions of the South in July-September 2011, they are still considerably higher compared to a year ago. Namely, in the last three months sorghum prices have reduced in the Sorghum Belt regions of Bay (24%), Bakool (30%) and Gedo (39%). Likewise, maize prices dropped significantly in Shabelle (50%) and Hiran regions (35%) and modestly in Juba regions (17%). However, the annual comparison of the prices indicate particularly steep increases, 117-189 percent, in Shabelles, Jubas and Bay regions; high increments are also recorded (37-78%) in other areas. The recent drop in cereal prices is attributable to limited supply from *Gu* 2011 harvest, off-season maize harvest in Shabelle and Juba regions as well as the ongoing food assistance in most parts of the southern regions<sup>1</sup>. Cereal prices in the Central have declined slightly (10%) due to low cereal supply from the southern regions, while the prices remained stable in the North.

Reflecting the food price dynamics, the cost of the Minimum Expenditure Basket (CMB) reduced in southern regions by 13-23 percent and only four percent in Central. In most of the northern regions, the CMB increased slightly, by 3-8 percent, with the exception of Togdheer (14%) and Sool (28%) where prices of food items such as sugar, vegetable oil, milk exhibited high increases (*see Market Sector*).

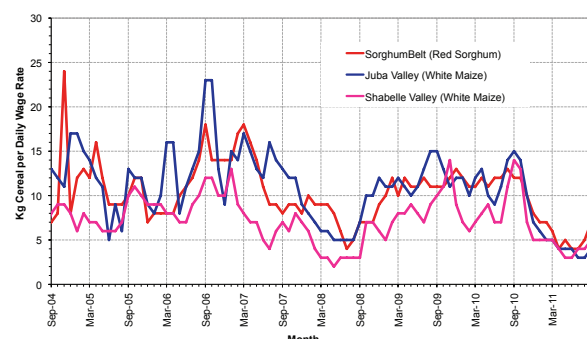
Labour wage rates in most parts of the southern regions remained stable while significantly declining in Middle Juba (33%) and parts of Lower Shabelle (22%), particularly in Merka and Afgoye, due to high competition for labour from IDPs in the South. However, the purchasing power of the population has somewhat strengthened in the last three months, as a result of a decline in cereal prices. Namely, the terms of trade (ToT) has improved in the regions of the Sorghum Belt, including Bay, Bakool and Gedo, whereas it has almost doubled in Hiran due to a sharp drop in cereal prices (40%) as a result of increased inflow of relief food from Ethiopia as well marginal local production of white sorghum in riverine areas. Similarly, the ToT has also appreciated in the maize producing regions of Lower Shabelle, Middle Shabelle and Lower Juba. On the contrary, in Middle Juba ToT declined due to a significant reduction in labour wages owing to limited labour opportunities, high labour competition and reduced economic activities hampered by the heavy rains. The ToT is lowest in Middle Juba (2kg per daily wage) and highest in Hiran (11kg) (Figures 4 and 5).

Although the current interventions are improving food access, unless the humanitarian food response scales-up considerably in the coming months the cost of living is anticipated to remain high up to the end of the year.

**Figure 4: Regional Trend in Terms of Trade Cereal to Labour (Central and North)**



**Figure 5: Regional Trend in Terms of Trade Cereal to Labour (South)**



<sup>1</sup> According to UN-OCHA Humanitarian update (14 September 2011), more than 2 million people across the country have benefited from the ongoing food aid, most of which are in the southern and central regions.

## RURAL

### Northern Regions

As result of average rains received in key pastoral livelihoods of the northern regions, pasture /browse and water have improved. Most of the main water sources like *berkads*, *dams* and *ballies* are replenished and water prices remain stable, with the exception of East Golis of Qandala, Coastal *Deeh* of Bari, lower Nugaal and parts of Sool. As a result of good *Karan* rains, pasture and browse have significantly improved in all livelihood zones of Galbeed and Awdal regions with the exception of the rain deficit pockets in Guban livelihood zone (Lughaya and Bullahar areas). Migration of livestock is mostly normal occurring within the livelihood zones. However, the livestock that out-migrated from Sool Plateau in the *Gu* 2011 season to pockets of upper Nugaal have not yet returned to their original locations.

Livestock (camel, sheep and goat) body condition in most of the pastoral livelihoods is average to near average with the exception of East Golis and Coastal *Deeh* of Bari region. However, the body conditions of lactating camels is below average across the northern livelihoods, apart from Awdal and W.Galbeed regions. Milk production for all species except camel is low. However, low to medium goat kidding is anticipated from November 2011 up to early January 2012 in most livelihoods, which is going to improve milk availability at household level. Herd sizes for all species are below baseline levels due to the effects of extended drought, with the exception of Galbeed and Awdal pastoral and agropastoral livelihoods. Volume of livestock exports and livestock prices have increased in July-September due to Ramadan and *Hajj* stocking. Income from frankincense production and fishing is gradually improving in East Golis and coastal areas of Calula, Qandala, Bossaso, parts of Iskushuban and Lasqoray districts.

As a result of the limited cereal flow from Southern Somalia and Ethiopia during the last 6months, availability of sorghum and maize in the markets is below normal, rendering prices to increase significantly. However, abundant *Gu/Karan* rains in July-August favoured *Gu/Karan* harvest, which is currently being collected in agropastoral areas. In September 2011, ToT between local quality goat and cereal (rice) increased in the Northeast by 4 percent compared to July 2011 and is equivalent to 50kg, which is comparable with the level a year ago (Figure 6). In Northwest, ToT between local quality goat and rice was equivalent to 41kg in September, indicating 11 and 9 percent decline from June 2011 and the same time last year, respectively. The decrease in ToT is mostly due to a slight rise in rice prices and minor decline in goat prices in the reporting period.

### Central (Galgadud , Mudug) and Hiran Regions

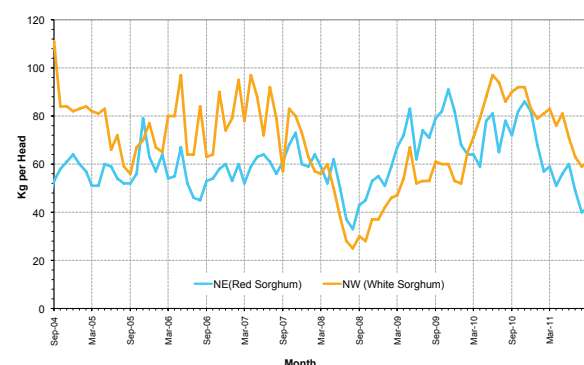
Improvements in pasture and browse in the areas that received near normal rains (Coastal *Deeh*, most of CowpeaBelt and part of Hawd and Addun during *Gu* 2011 were short lived due to the massive livestock in migration from rain deficit areas of central regions. As the *Deyr* rains have not yet started effectively in central regions, pasture and water conditions remain below normal in most parts of pastoral livelihoods where the *Gu* rains were erratic and below normal (parts in *Addun*, Hawd and pockets in the Cowpea Belt). Livestock movement in search of dried pasture/browse and water is common across the central regions. Limited pasture/browse and water resources have led to an eruption of clan clashes among the pastoralists in rural villages of Galgadud region during the reporting period.

Camel, goat and sheep maintain near average body condition due to limited migration options to the areas where dry pasture and meagre water are available. Kidding/calving and lambing is not reported during July-September. Therefore, milk production is almost none for goat/sheep and low for camel due to low camel births as a result of high abortion rates in the last *Jilaal* in all livelihoods. In addition, Hawd and Addun pastoralists reported cases of abortion for goats conceived in the *Gu* 2011 due to unknown diseases. However, low to medium kidding of goat/sheep is expected in Addun and Hawd livelihoods in the coming *Deyr*. Livestock herd size are below baseline levels across the livelihoods, particularly in the Cowpea Belt and Coastal *Deeh*.



Poor Pasture and Browse. Coastal *Deeh*, Iskushuban, Bari region. FSNAU, October 2011

Figure 6: Regional Trend in Terms of Trade Cereal to Goat



Goat for grazing. Harardere, Mudug region. FSNAU, October 2011

A further decline of herd size is expected before the end of the year according to the projections made during *Gu* analysis. Milk production will continue to be low throughout October – December 2011 but will slightly increase during January 2012 due to expected low camel births.

The purchasing power across the pastoral and agropastoral livelihoods has improved in the last three months (Jul-Sep'11) due to a decline in local cereal prices and an increase in goat prices. In September 2011, in Central, ToT between local quality goat and cereal (sorghum) increased by 20 percent (41kg to 49Kg) compared to July 2011, but is still 38 percent lower (79 Kg to 49Kg) than the same time last year (Figure 7). Similarly, ToT rice to local goat increased marginally (4%) from July but it is lower than (15%) than a year ago. Humanitarian interventions are at-scale in the drought affected livelihoods of Hawd and Addun, but negligible in Coastal *Deeh* and Cowpea Belt since April 2010 due to prevailing insecurity, which restricts access to these areas.

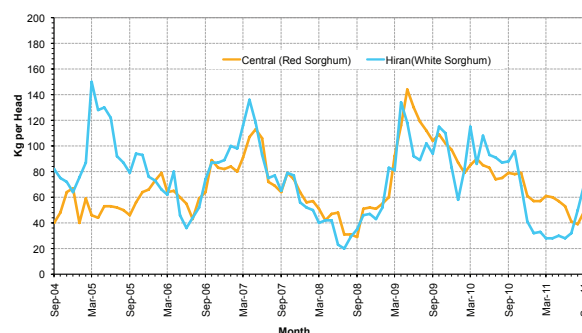
### Southern Regions

The good *Hagaa* rains between July and early September 2011 in Lower Shabelle and parts of Juba regions were beneficial for off-season crop harvest collected in September-October 2011. Therefore, this led to an increased supply of local cereals as well as agricultural labour opportunities in the riverine livelihoods of Lower Shabelle and Middle Juba regions, it improved incomes and food sources of the poor households. However, the vast majority of poor and lower middle households in these areas continue to depend on food purchases so remain stressed, due to continuing high local cereal prices.

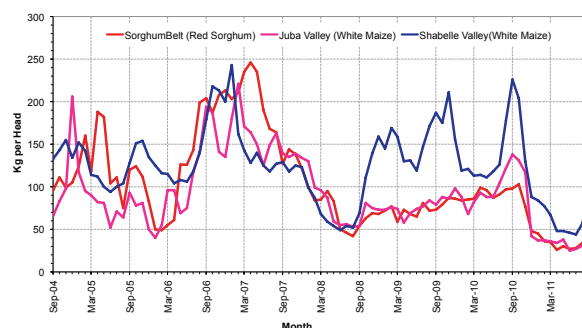
Most regions in the South received moderate rains from late September to the first *dekad* of October 2011, which benefitted pasture and water conditions. However, the livestock body condition remains poor and herd sizes are low in most livelihoods due to high livestock off-take over the period of extended drought. The availability of milk is low due to low births during *Gu* 2011 and medium conception rate for all species during *Hagaa* period in Shabelle and parts of Juba and Bay regions. Even though access to saleable animals amongst the poor pastoral and agropastoral households is limited, income from livestock sales has slightly improved following increased livestock prices due to high *Hajj* demand.

The purchasing power amongst the poor households has improved in the last three months (Jul-Sept'11) although the labour wage rates in most parts of the southern regions remained stable with a significant drop observed in Middle Juba (22%) due to high labour competition for labour opportunities as well as reduced economic activities hampered by the heavy rains. Therefore, the improved ToT is mostly due to a decline in cereal prices, increase in goat prices and increased *Deyr* agricultural activities (planting, weeding and irrigation) (Figure 8). Other factors contributing to the improvements in the South include increased humanitarian interventions, including cash for work, relief food distributions as well as agricultural interventions such as distribution of seed and fertilizers as well as rehabilitation of canals and water catchments.

**Figure 7: Regional Trend in Terms of Trade Cereal to Goat**



**Figure 8: Regional Trend in Terms of Trade Cereal to Goat**



*Off-Season crop, Buale, Middle Juba. FSNAU, September 2011*

### Recent and forthcoming publications and releases

FSNAU/FEWSNET Climate Data Update, September 2011  
FSNAU/FEWSNET Market Data Update, September 2011  
FSNAU Technical Series Report Nutrition Situation, September 2011  
FSNAU Technical Series Report, Post *Gu* Analysis, October 2011

NOTE: The above publications and releases are available on the FSNAU website: [www.fsnau.org](http://www.fsnau.org)

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